



Performance Enhancement Project

Designing a Follow-up/Retention System to Enhance Adult/Dislocated Worker Customer and WIA Performance

HANDOUT - E FOLLOW-UP/RETENTION ASSESSMENT TOOL

Culture of Follow-up/Retention: Elements	Our local area/program has this	This issue needs work	What we can do to improve
Fostering Relationships			
With Adults and Dislocated Workers:			
• Develop relationships well before placement			
• Ensure opportunities for relationships to develop incrementally			
• Create an atmosphere of trust			
• Make sure caseloads are realistic for developing relationships			
• Provide training and support for case managers			
With Employers:			
• Systematically link with employers			
• Focus on meeting their needs			
• Create an efficient structure for working together			
With Educational Institutions:			
• Systematically link with educational institutions			
• Focus on meeting their needs			
• Create an efficient structure for working together			



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Building Skills for Retention			
Provide soft skills training:			
<ul style="list-style-type: none"> Punctuality, professional dress, body language, receiving feedback/criticism, etc. 			
Provide life skills training:			
<ul style="list-style-type: none"> Money management, contingency planning, workplace harassment, and dealing with job problems, etc. 			
Provide hard skills or occupational skills training:			
<ul style="list-style-type: none"> Skills related to a specific trade or position 			
Preparing For Placement			
Collect & update customer contact info frequently, especially just before placement			
Make sure customers are aware of follow-up services			
Establish schedules for regular contact			
Make sure customers are really "job-ready" or "school-ready" before placement			
<ul style="list-style-type: none"> Prevent soft exits and program dropouts 			
<ul style="list-style-type: none"> Hold pre-exit conferences with customers to check in and prepare for transition 			
Placement in the "Right" Job			



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Make sure customers really know what they want to do			
Determine what are "good jobs" in your area			
Make sure job logistics are suitable			
Work with employers who offer "good" jobs			
Work with educational programs that lead to nationally recognized credentials			
Providing Post-Placement Support			
Act on established schedules for regular contact between customer and case managers			
Make sure crisis intervention services are available to help customers deal with sudden emergencies			
Develop meaningful individual and group support activities that are convenient for customers			
Make sure staff are available to deal with customers when they need help			
Promoting Advancement			
Keep career advancement plan updated			



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Provide advice to customers about asking for raises or promotions at work			
Offer skill upgrading opportunities			
Data Quality			
Frequency of data entry:			
<ul style="list-style-type: none"> Enter data regularly 			
<ul style="list-style-type: none"> Train staff on the importance of frequent data entry 			
<ul style="list-style-type: none"> Use ticklers (electronic or paper) to help staff remember dates for exit-based and real-time measures 			
Accuracy of data entry:			
<ul style="list-style-type: none"> Use system and staff edit checks 			
Use supplemental information as a proxy for UI wage data to provide a fuller picture of customer performance			
Ensure data quality after exit:			
<ul style="list-style-type: none"> Train staff on MIS follow-up screens 			
Smooth Transitions			
Determine who decides when customers are:			



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• Ready to be placed			
• Ready to exit WIA			
Determine exit policy			
• All providers know about and understand exit policy			
De-emphasize exit to customer			
Make sure follow-up staff work extensively with customer prior to placement			
Caseload Considerations			
Keep caseloads manageable and effective			
Create a tiered system of individual follow-up services:			
• Develop targeting criteria			
Other			



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